Cousins

Customer Services

Tenant Support Interface

user manual

September 2013

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Getting Started

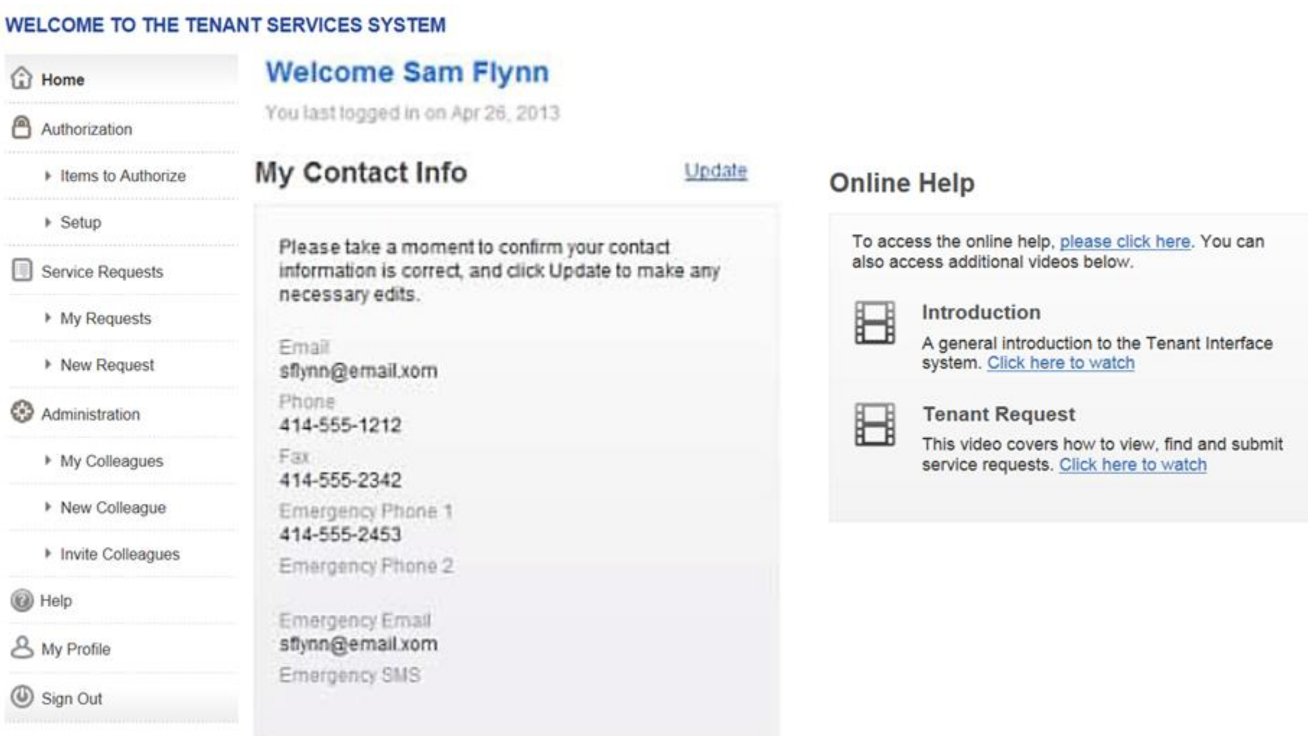
About the Customer Services Interface

Your property management company has provided a self-service, web interface branded as Customer Services under a system known as the Tenant Support Interface. This interface enables you to enter and track service requests.

The web address and contact information for your property is provided below. Your property management group can provide you your user name and password for using Customer Services.

Please note that the screenshots included in this manual are for instructional purposes only and will not necessarily appear as depicted, depending on how the service has been configured for your property.

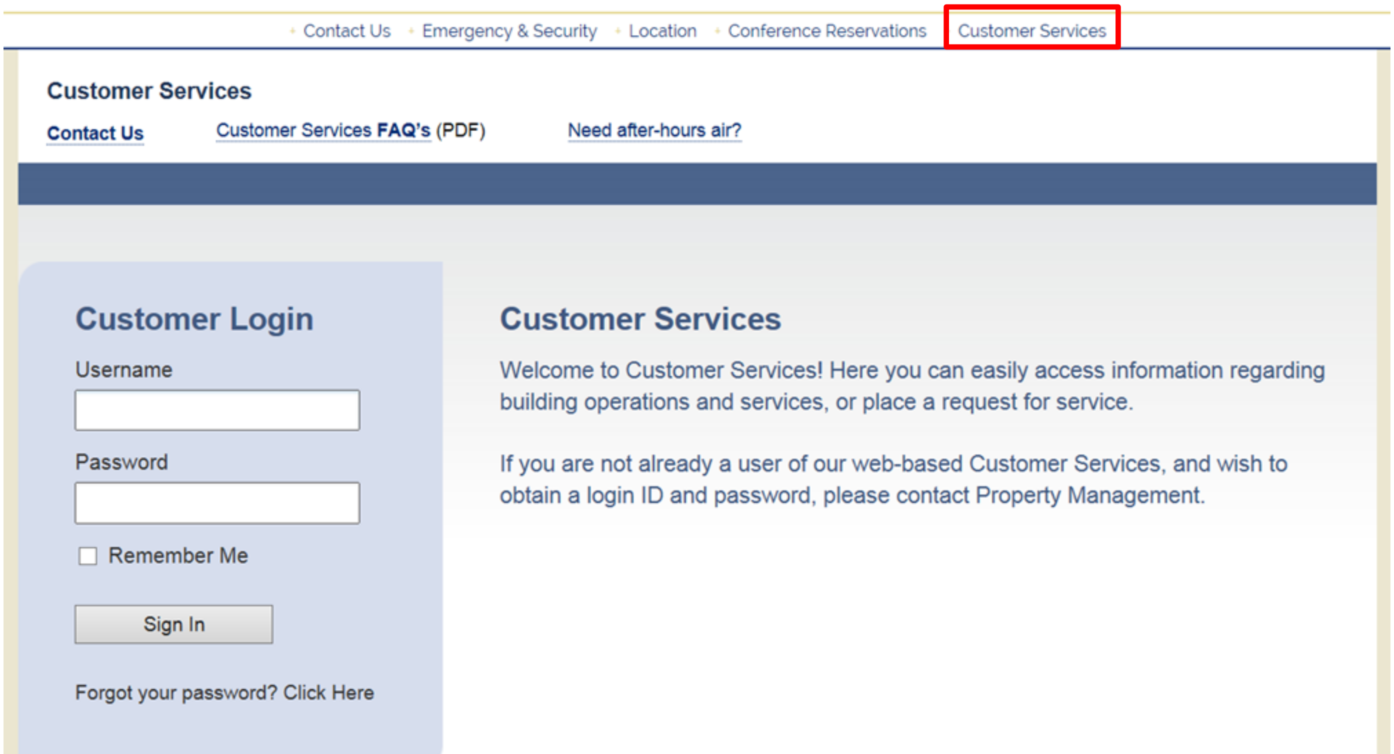
777 Main	817.321.1100	http://www.777main.com/home/customer-services.asp
Greenway Plaza (Phase I) *Bldgs. 1, 2, 3, 4, 5, 3800, The Shops*	713.965.2913	http://www.greenwayplaza.com/home/customer-services.asp
Greenway Plaza (Phase II) *Bldgs. 8, 9, 11, 12*	713.965.2212	http://www.greenwayplaza.com/home/customer-services.asp
Post Oak Central *1980, 1990, 2000*	713.871.0500	http://www.postoakcentral.com/request/



Logging In

i After logging in, users who are inactive for 60 minutes will be automatically logged out.

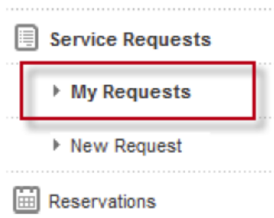
1. Open a web browser, enter the web address for your Property Management company (see Getting Started), and click on the “Customer Services” link. The Login screen is displayed.
2. Click the **Username** field and enter your user name.
3. Click the **Password** field and enter your password.
4. Click **Sign In**.



Tenant Service Requests

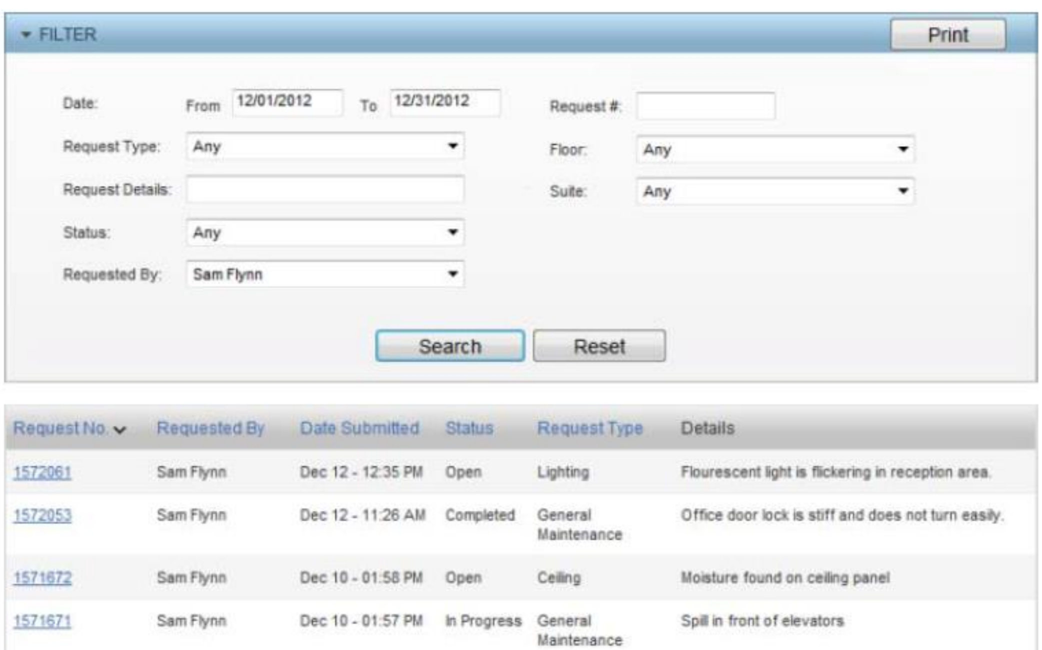
The My Requests List

The My Requests list allows you to view and search for service requests that have been made. A history section in the request's details tracks status updates to the service requests as they occur. To access the list, click on **My Requests** in the navigation bar to the left.

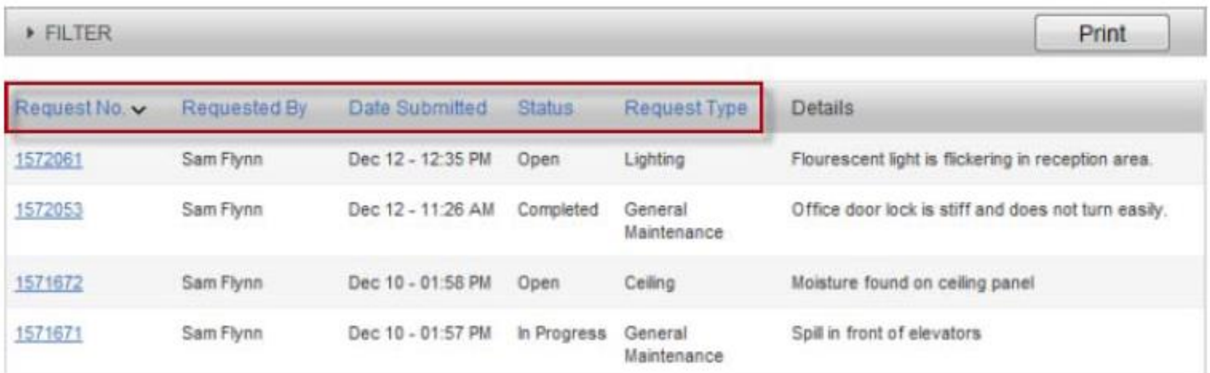


1. By default, the system displays requests submitted in the last 30 days, of any request type and any status. To make changes, click on the Filter section above the list if it is not already expanded. This will display a wide variety of filter options.

> *i* If you have access to view your colleagues' requests, set the **Requested By** filter to **Any** to view all requests.



2. Use the dropdown menus to filter the list by Date, Request Type, Request Details, Status, Request Number, Floor and Suite.
3. Click the **Search** button. Requests matching the selected criteria are displayed on the My Service Requests screen.
4. By default, the system organizes the Requests by Request Number in descending order (highest to lowest). You can sort the list by clicking on the following headings.
    - Request Number
    - Date Submitted
    - Status
    - Request Type

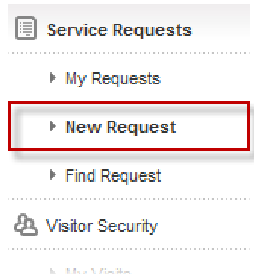


5. You can print the list by clicking the **Print** button.

6. To view request's details from this list, click the associated **Request Number**. The request details are displayed.

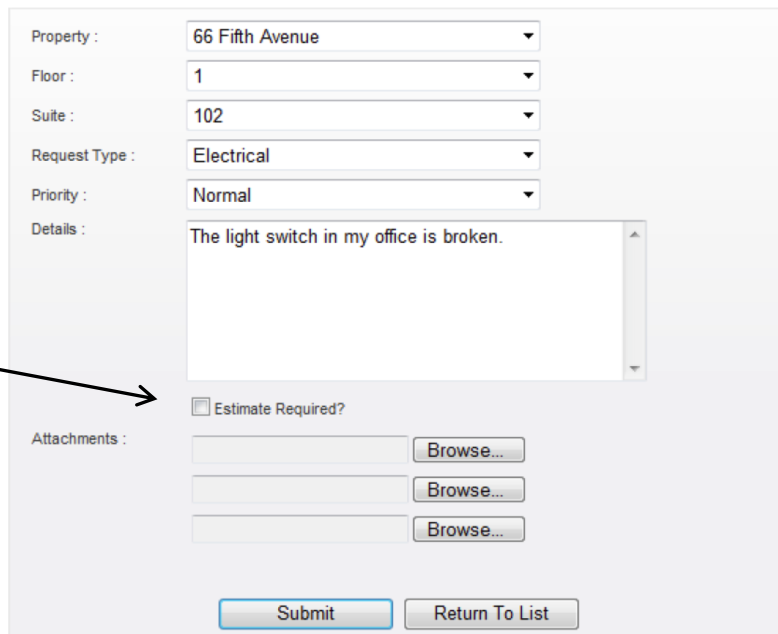
Making a Request

Requests are submitted to report issues which require attention from your Property Management Company. To create a **New Request**, Click New Request and then follow the steps outlined below.



1. The Service Request Entry screen is displayed.

This field is only available as an Administrator



2. The system automatically selects your property and location, but some tenants may be configured to enter Requests for more than one building. Click the **Building** field and select the desired building from the drop-down list.
3. Use the drop-down menus to select the **Floor** and **Suite, Request Type,** and **Priority.**
4. Click the **Details** field and enter the details of the request.
5. Indicate if an estimate is required using the checkbox provided. (When setting up the service request, the tenant may not know whether an estimate is required. Property Management will determine whether the request is billable and send an estimate for approval to the customer.)

6. If there are any files you would like to attach to the requests, such as pictures, PDFs, or other documentation which concerns the request, click Browse…and select the file you would like to attach.
    - You can attach a maximum of 3 files.
    - The combined size of all files attached cannot exceed 10MB.
    - After submitting your request, you cannot add, remove, or otherwise modify the attachments.
7. Click **Submit**. Your request is submitted and the Request Confirmation screen is displayed.

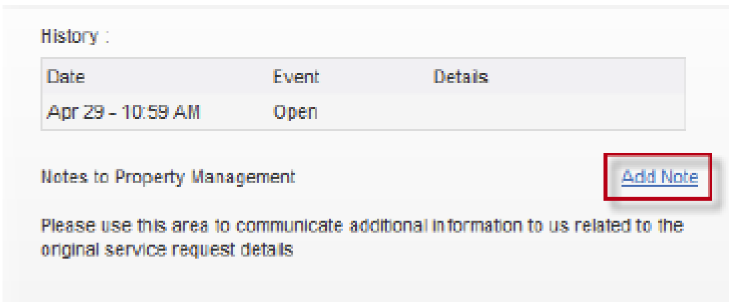
> *i* If your property uses the Authorization feature, your request may require authorization before it can be processed. The system will display a message informing you that authorization is required. See Changing Your Profile in the manual for more information.

8. Click **Submit**. Your request is submitted and the Request Confirmation screen is displayed.

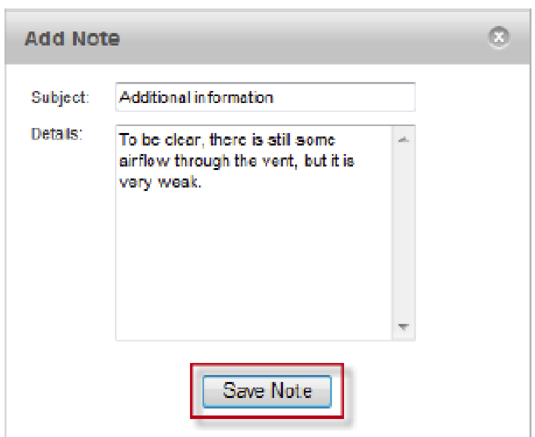
Sending a Note

You can append a note to a service request after it has been made. This can be used to provide additional information concerning the request. To send a note, follow these steps:

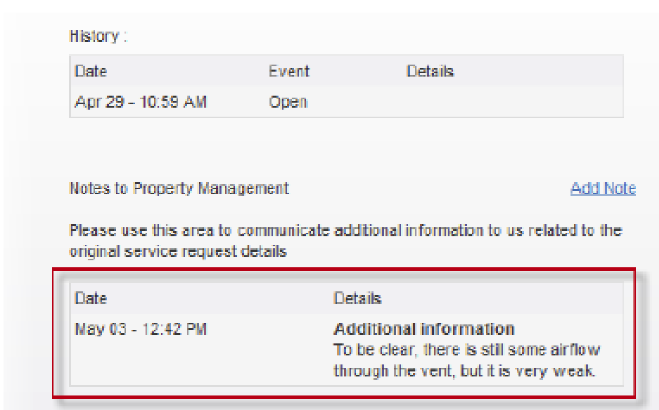
1. Using the My Requests list, locate the service request you would like to add a note to. Click the request number to display the request details.
2. On the request details page, click **Add Note**.



3. In the Add Note window that opens, enter a subject name and details for the note, then click **Save Note**.



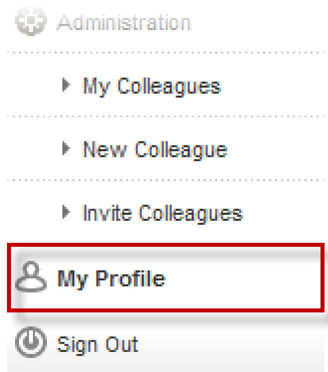
4. The note has now been added to the service request.



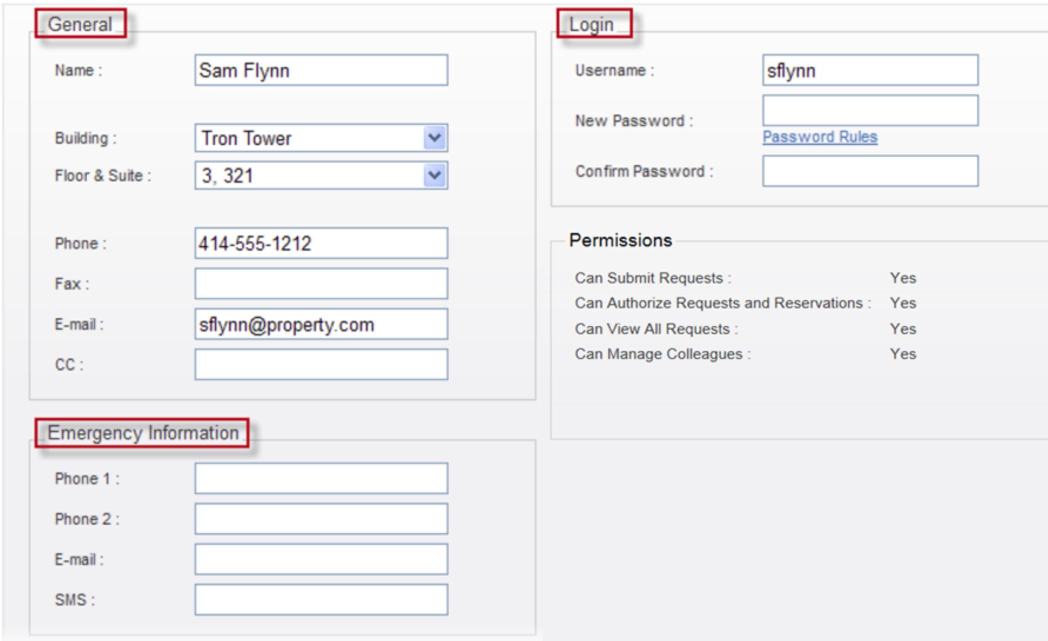
My Profile

Changing Your Profile

The My Profile screen allows you to manage the information in your login account.



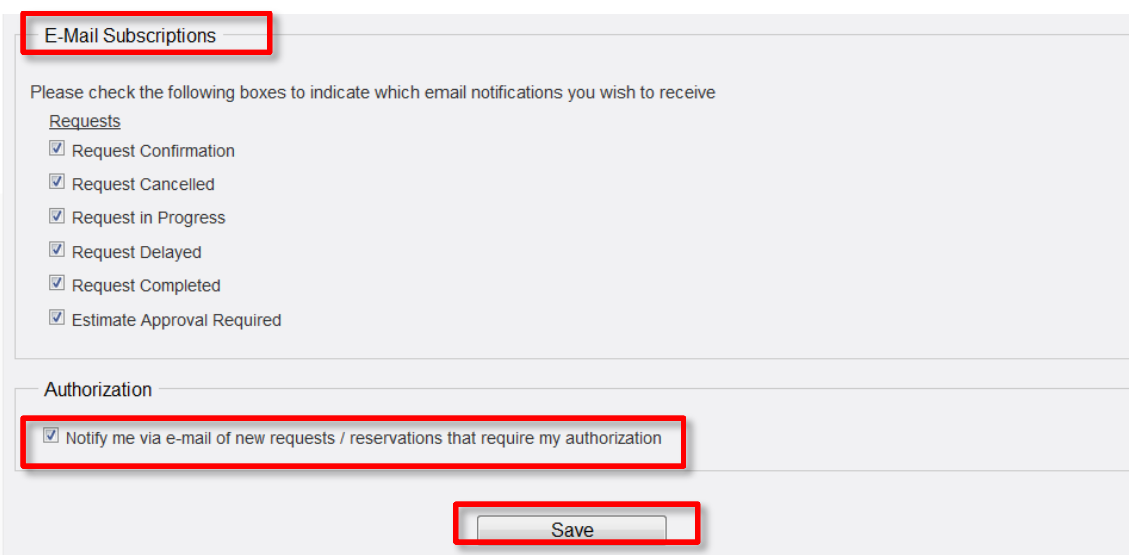
1. The General Information section contains contact and location information. The following information can be changed in this section:
   - Name
   - Building
   - Floor & Suite
   - Phone number
   - Fax
   - Email
   - CC (used with service request notifications)
2. The Emergency Information section allows you to enter emergency contact information, which will be used to transmit emergency notifications to you. (This feature is not currently being used at this time)
3. The Login section allows you to modify the username and password you use to log in to the TSI. **Please be sure to use the company email address as each users login ID.**
4. If you are an Administrator, the Permissions section can only be edited by your Property Management group. However, Administrators can edit Permissions for their colleagues.



5. In the E-Mail Subscriptions section, place checkmarks beside all notification types you would like to receive email notifications for. Notification types are broken down by type.

6. If your permissions indicate that you are able to authorize requests, you can enable or disable email notification of new requests by checking or unchecking **Notify me via email...** in the Authorization section.

7. When you are finished making changes, click **Save**.



Authorization

Setup

The Tenant Authorization feature enables you to designate one or more of your colleagues as Authorizers, to authorize or decline these requests within Customer Services. To become an Authorizer, you must contact your property management office to grant access to this feature.

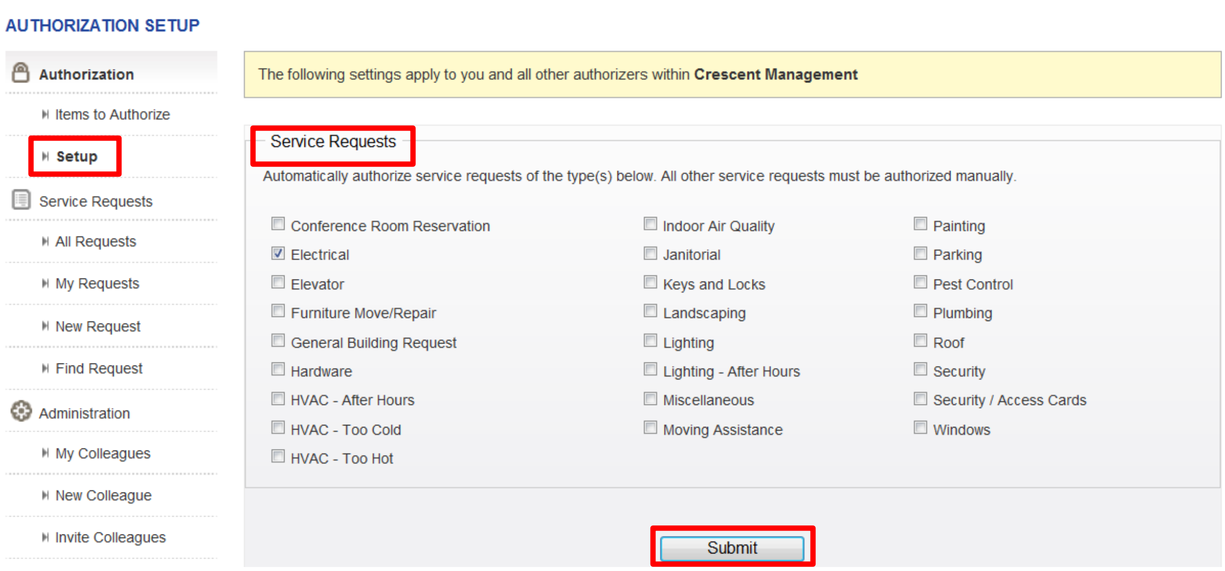
> *i* It is **not** necessary for Tenant Authorizers to be Tenant Administrators.

The Setup screen allows you to:

- Set up automatic authorization for certain Request Types

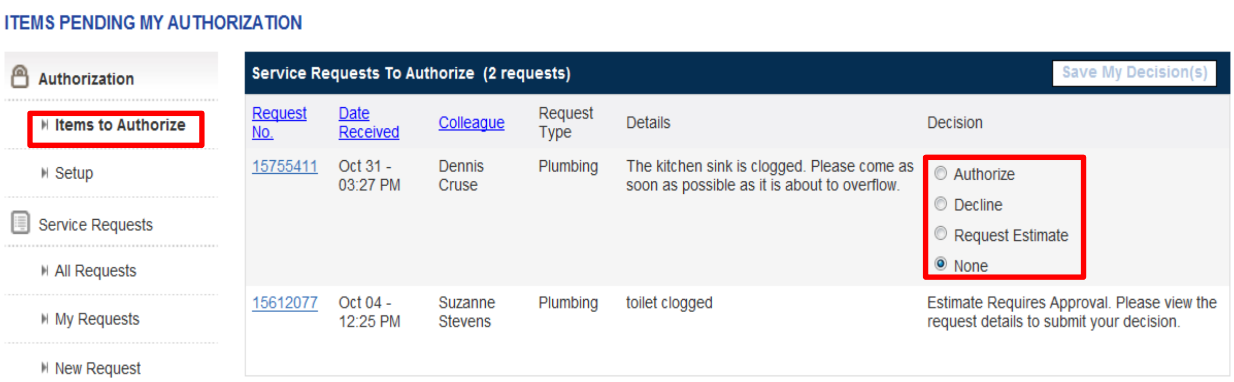
As shown in the screenshot below, these settings apply to all authorizers in your company.

1. Click **Setup** from the menu to the left, found under the **Authorization** section.
2. To select which Request Types can be automatically authorized, locate the desired **Request Type** and click the checkbox to select it.
3. Click **Submit**.



Authorizing Items

1. Select Items to Authorize from the main menu. Service Requests requiring authorization are displayed in the top section.
2. By default, the system displays items in the descending order by Request Number from the highest number to the lowest.
    - To arrange items in ascending order by number, click the Request No. column heading.
    - To arrange items by date, with the most recent requests at the top of the list, click the Date Received or Date Required column heading.
    - To arrange items by colleague in ascending alphabetical order, click Colleague.
3. To authorize an item, locate the desired item and click the Authorize or Decline radial button as desired. For Service Requests, you can also select Request Estimate to receive a cost-estimate from your property manager.
4. When all selections are made, click Save My Decisions. Requests that are authorized will be marked Authorized and those that are declined will be marked Declined. If None are selected, no change will be made to a specific request (it will still need to be authorized or declined at some point).



Tenant Administrators

About Tenant Administrators

Tenant Administrators are contacts that have access to Customer Services and have the ability to Activate or Deactivate colleagues as well as grant colleagues permission to do one or more of the following:

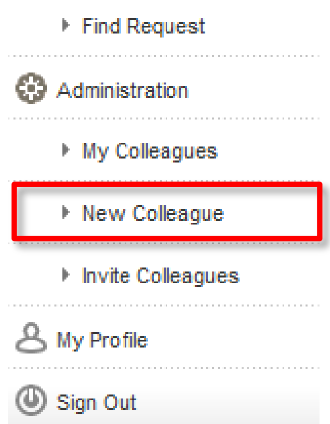
- Make tenant requests
- Self-subscribe to announcements

The abilities that a Tenant Administrator has are determined by their Tenant Administrator Permissions, which are set up at the time the account is created by your property management company (can be added or modified at a later date by property management).

Adding a Colleague

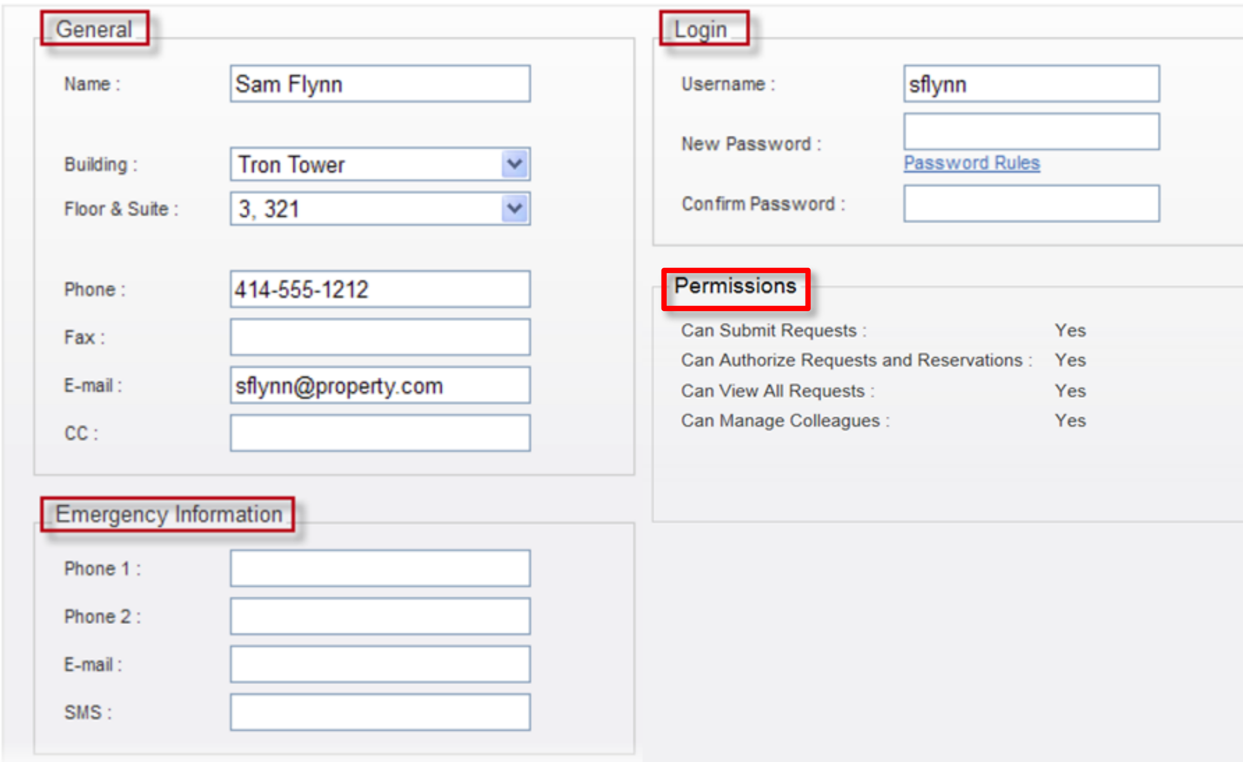
To add a colleague as a contact in Customer Services:

1. Click **New Colleague** in the Administration section of the TSI menu, located on the left side of the screen.

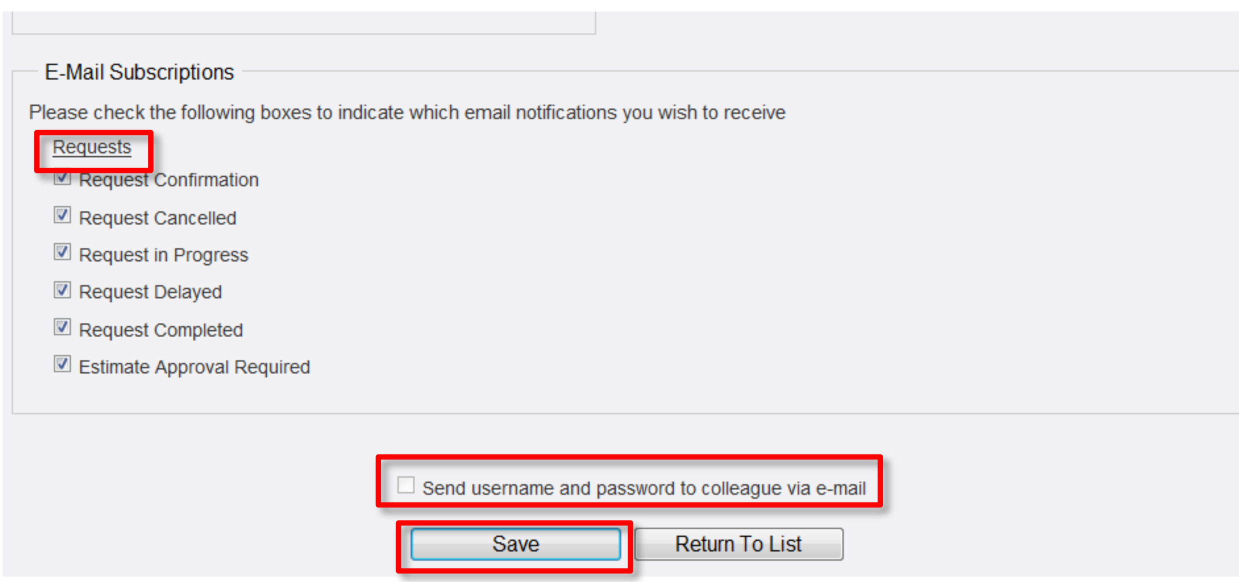


2. The Contact Entry screen is displayed. The General Information section contains contact and location information. The following information can be added in this section:
    - Name
    - Building
    - Floor & Suite
    - Phone number
    - Fax
    - Email
    - CC (used with service request and reservation notifications)
3. The Emergency Information section allows you to enter emergency contact information, which will be used to transmit emergency notifications. (This feature is not currently being utilized at this time)
4. The Login section allows you to create the username and password used to log in to the TSI. . **Please be sure to use the company email address as each users login ID.** Users can edit their passwords only.
5. The Permissions section allows you to set up the colleague's permissions.

> *i* Depending on the specific administrative permissions you have been given, one or more options in the Permissions section may be inaccessible to you.



7. In the E-Mail Subscriptions section under **Requests**, place checkmarks beside all notification types you would like your colleague to receive email notifications for.



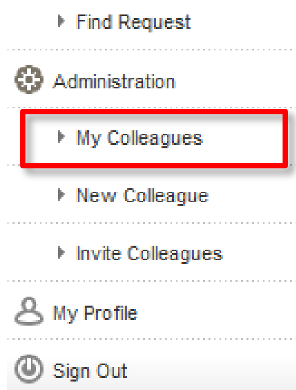
8. After you set up a username and password for your colleague, place a checkmark beside **Send username and password...** if you would like to send the new login information by email.

9. When you are finished making changes, click **Save**.

Modifying Colleagues

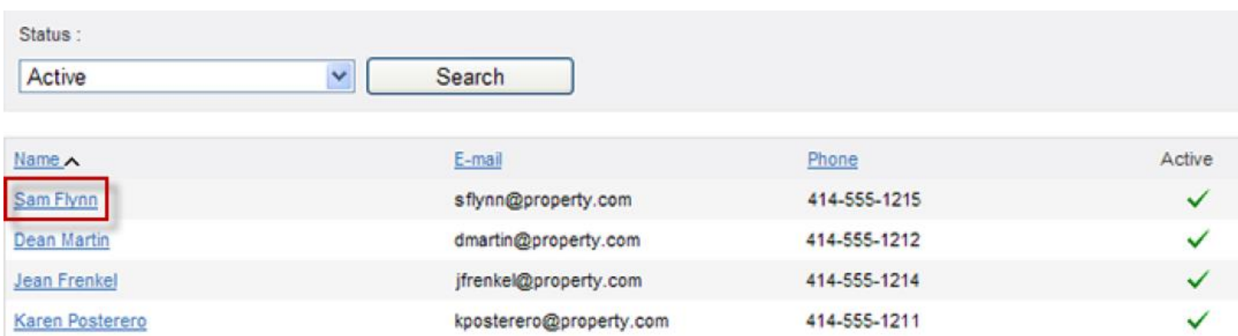
Tenant Administrators can modify their colleagues' settings in the following manner:

1. Click **My Colleagues** in the Administration section of the Customer Services menu, located on the left side of the screen. A list of Colleagues is displayed.



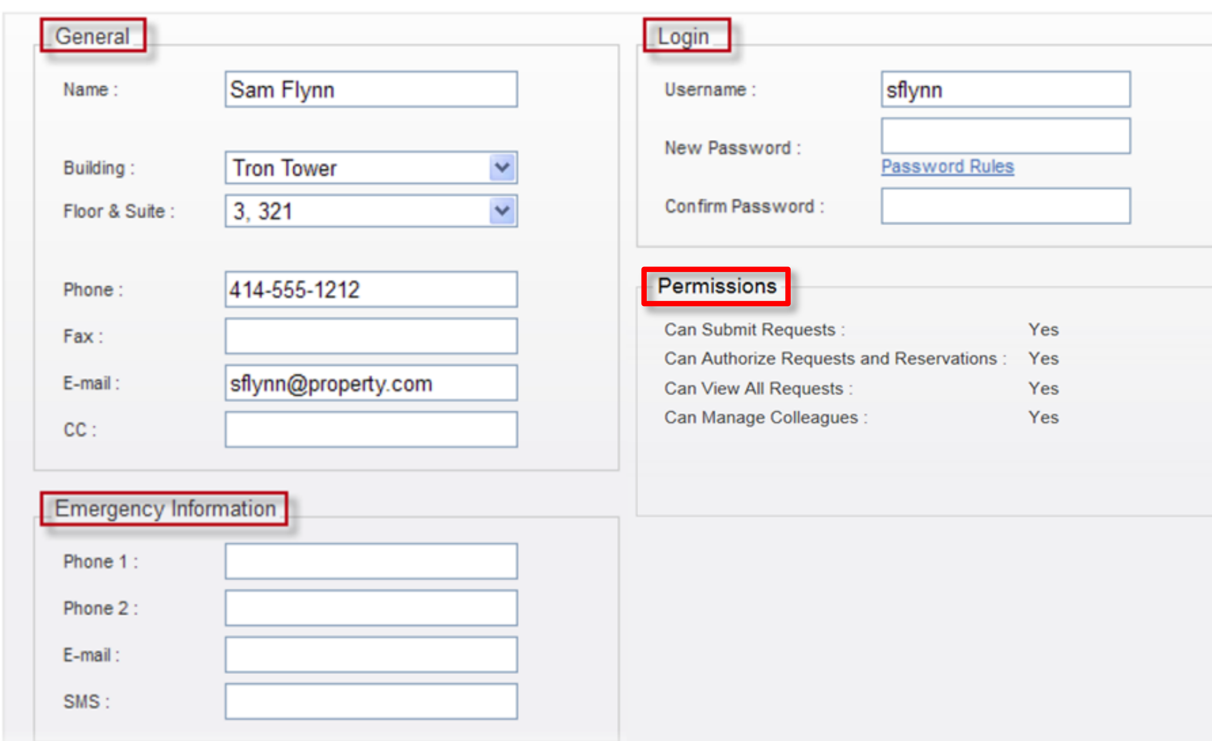
2. Select the colleague you would like to modify.

> *i* The My Colleagues list can be set to display active or inactive contacts using the **Status** drop-down list and clicking **Search**. You can also sort the list in ascending or descending order by clicking on the **Name**, **E-mail**, and **Phone** field headings.

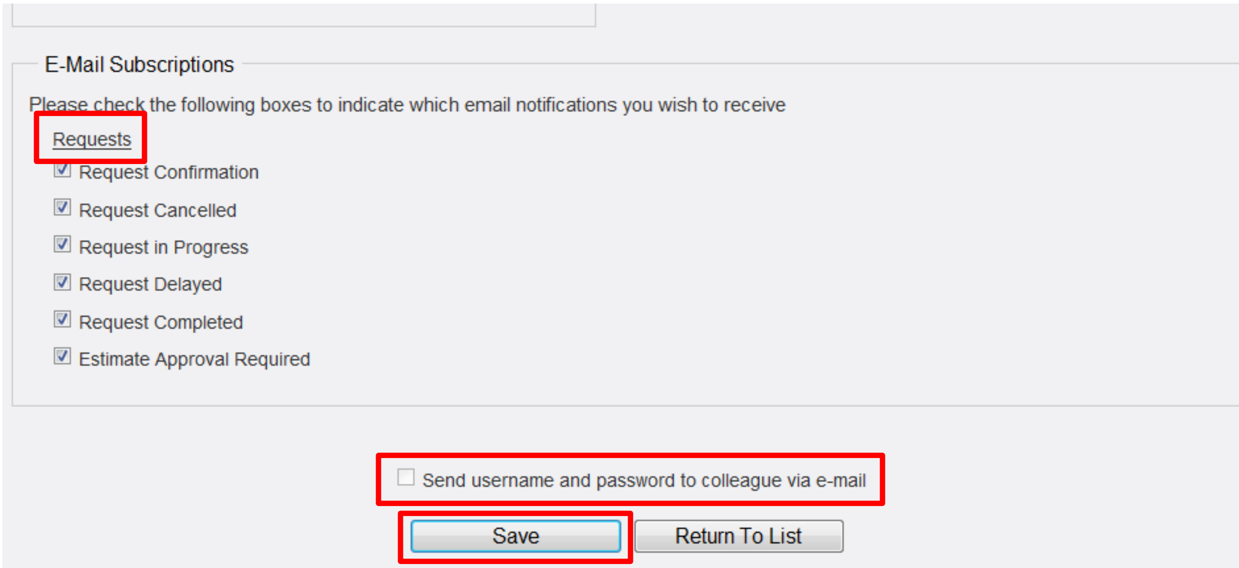


3. The Contact Entry screen will be displayed. The General Information section contains contact and location information. The following information can be changed in this section:
    - Name
    - Building
    - Floor & Suite
    - Phone number
    - Fax
    - Email
    - CC (used with service request notifications)
4. The Emergency Information section allows you to enter emergency contact information, which will be used to transmit emergency notifications. (This feature is not currently being utilized at this time)
5. The Login section allows you to modify the username and password you use to log in to the TSI. **Please be sure to use the company email address as each users login ID.** Users can edit their passwords only.
6. The Permissions section allows you to modify the colleague's permissions.

Depending on the specific administrative permissions you have been given, one or more options in the Permissions section may be inaccessible to you.



7. In the E-Mail Subscriptions section under **Requests**, place checkmarks beside all notification types you would like your colleague to receive email notifications for.



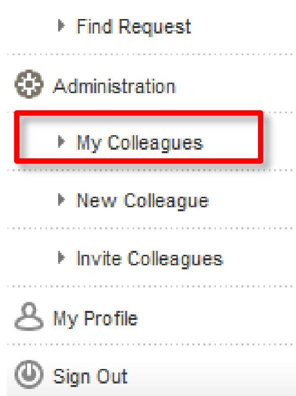
8. If you made a change to your colleague's login information, place a checkmark beside **Send username and password...** if you would like to send the new login information by email. (Note: Colleagues can edit the same information within their own profile, with the exception of "Permissions". Only administrators can edit permissions for their colleagues.)
9. When you are finished making changes, click **Save**.

Deleting a Colleague

Colleagues cannot be deleted; however, you can deactivate them, which disables the account. See Deactivating a Colleague in the user manual.

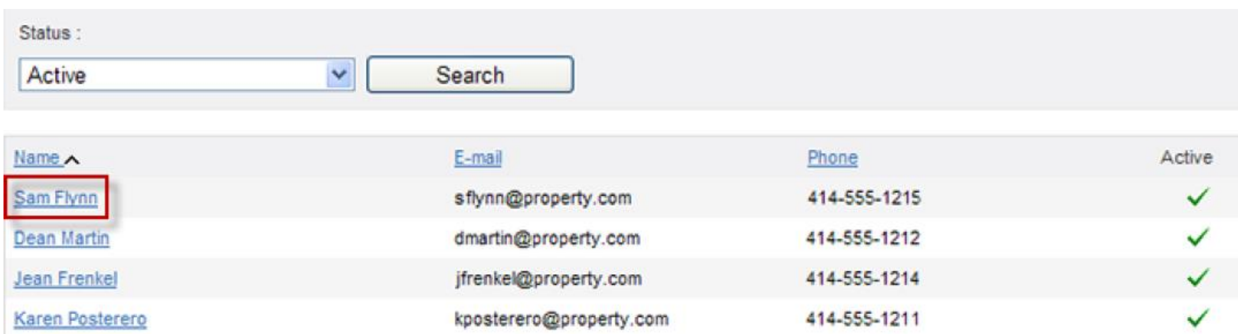
Deactivating a Colleague

1. Click **My Colleagues** in the Administration section of the Customer Services menu, located on the left side of the screen. A list of Colleagues is displayed.

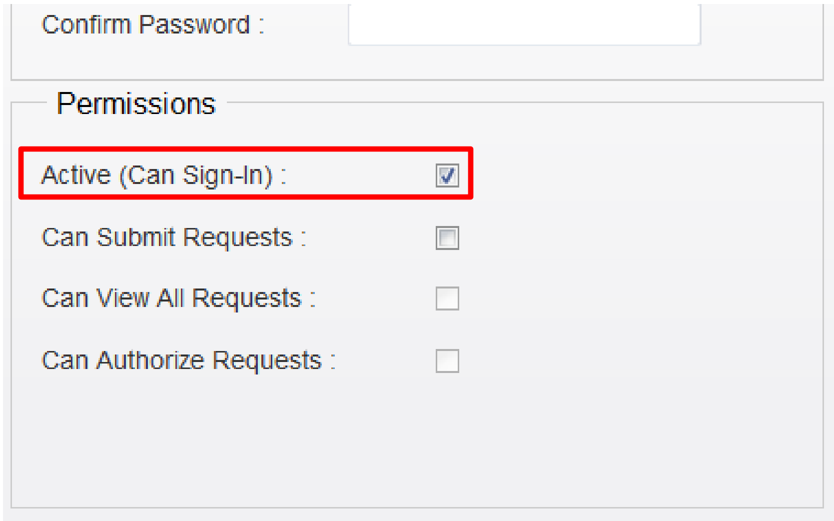


2. Select the colleague you would like to deactivate.

> The My Colleagues list can be set to display active or inactive contacts using the **Status** drop-down list and clicking **Search**. You can also sort the list in ascending or descending order by clicking on the **Name**, **E-mail**, and **Phone** field headings.



3. The Contact Entry screen will be displayed. In the Permissions section, remove the checkmark beside **Active (Can Sign-In)**.



7. Click **Save**.